Unbeaten Path® INTERNATIONAL

Presents

By Invitation Only®

Composing an airtight guest list for BPCS/ERP LX for v8.3.x

BIO version V8.3.x-B

Return to the product description for By Invitation Only software

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Getting Started Overview
General Product Discussion

In a nutshell: By Invitation Only software

By Invitation Only software facilitates due diligence management of BPCS / ERP LX user profiles.

This software product greatly simplifies the definition, maintenance, removal, and documentation of BPCS /ERP LX user authorization information. It makes it easy for a security administrator to welcome users into only those parts of software that are "right" for them.

The vast majority of the content in this user's manual pertains in parallel fashion to both BPCS versions and ERP LX versions. For simplicity therefore, the term "BPCS" will be used in this manual to pertain to all INFOR BPCS and ERP LX products. If there is a distinction between functionality for BPCS and functionality for ERP LX, it will be noted on the specific applicable page.

Description of vanilla BPCS functionality for user and menu security

The best place to start is to understand how BPCS security works in its vanilla form. Please refer to this commentary to accomplish that purpose. It's complicated.

www.unbeatenpath.com/software/bio/vanilla.pdf

Description of By Invitation Only software functionality

The product is intuitive. Once your security administrator discovers how easy, intuitive, and functional the software is to use, security maintenance won't be viewed as a clunky chore anymore. The security work will be addressed more promptly and thoroughly, making a constructive difference in your enterprise's internal control regimen.

The software has ingenious, easy-to-use features that encourage security administrators to upgrade user profile definitions. It makes the task of correcting years of accumulated user profile "shortcuts" seem achievable. The product opens the door to using the full granularity available for BPCS / ERP LX definitions.

⌖ Defining security authorizations for a new user

With By Invitation Only, the security administrator no longer needs to have either a world-class memory or an outstanding set of crib notes. The product displays a complete list of all valid selections for each of these dimensions:

- ☒ Products
- ☒ Programs
- ☒ Menus
- ☒ Companies
- ☒ Warehouses
- ☒ Transaction types
- ☒ Facilities (only for ERP LX)
- ☒ Security Groups

Furthermore, the software juxtaposes the pertinent code for each selection together with a description of what that code means. The administrator now can immediately see that:

- ▷ warehouse code **15** is Wisconsin and warehouse code **51** is Texas
- ▷ program **ACR900** is A/R Period Close and program **ACR910** is A/R Year Close

Getting Started Overview

General Product Discussion, continued ...

Description of By Invitation Only software functionality, continued ...

Maintaining security authorizations across an entire dimension

By Invitation Only enables the security administrator to escape vanilla BPCS' one-user-at-a-time processing constraint; the administrator can now address all user security definitions for a given dimension in one step.

To illustrate, if a new warehouse code is added, vanilla BPCS would force the administrator to define access to that new warehouse one user at a time. With By Invitation Only, the administrator can directly specify a set of authorized user names to that new warehouse.

The same approach can be used to maintain all users to a product, program, menu, company, warehouse, transaction type, security group or facility (for ERP LX) dimension.

Define multiple distinct sets of authorities for the same user profile

By Invitation Only enables a single BPCS user profile to perform one job function in Company XX and an entirely different job function in company ZZ. This same flexibility to assign distinctive authorities to the same BPCS user can also be set up across different warehouses and across different facilities.

The brand name for this functionality is: **Snap-on User Authorities**™.

Displaying security authorizations across an entire dimension

Let's say that the security administrator wanted to determine which specific profiles currently have access to the Item Master Maintenance program. With By Invitation Only, he/she could simply select the menu option to work with authorizations ***by program***.

By Invitation Only would then display a list of all the valid BPCS / ERP LX programs.

Once the administrator selects the pertinent program (INV100 in this example), a display appears listing all profiles who have authority to access that program. Profiles are included on the list whether that authorization exists because:

1. a given BPCS profile is a "super user," or ...
2. a given BPCS profile has been granted authority to all products, or ...
3. a given BPCS profile has been granted authority to the entire Inventory product, or ...
4. a given BPCS profile has been granted authority to that specific program.

The administrator could them remove authority to the program for specific profiles or toggle to a list of the profiles that are not authorized to the program and grant authority to specific profiles.

The display will also list all users who could gain authority to access that program through **Snap-on User Authorities**™ functionality.

Getting Started Overview

General Product Discussion, continued ...

Description of By Invitation Only software functionality, continued ...

- **Audit trail functionality**

  By Invitation Only maintains a log file for all user authority changes ... including new users, updates, deletions, and user profile copies. Auditors will be able to request a comprehensive listing for each security change: the nature of the change, who used By Invitation Only software to make the change, and the date/time the change became effective.

Getting ready for an INFOR user audit

By Invitation Only can also be used to help enterprises prepare for an INFOR user audit. The software displays a count of user profiles in the BPCS security files. It also identifies whether the user profile is a valid IBM Operating System profile (OS profile) and whether that profile is active or inactive.

Unlike vanilla BPCS security programs, By Invitation Only provides a way to delete BPCS/ERP LX profiles even if those profiles no longer have a valid operating system profile. Technical details about obsolete profile management are available in the interesting technical details document:

www.unbeatenpath.com/software/bio/BIOdetails.pdf

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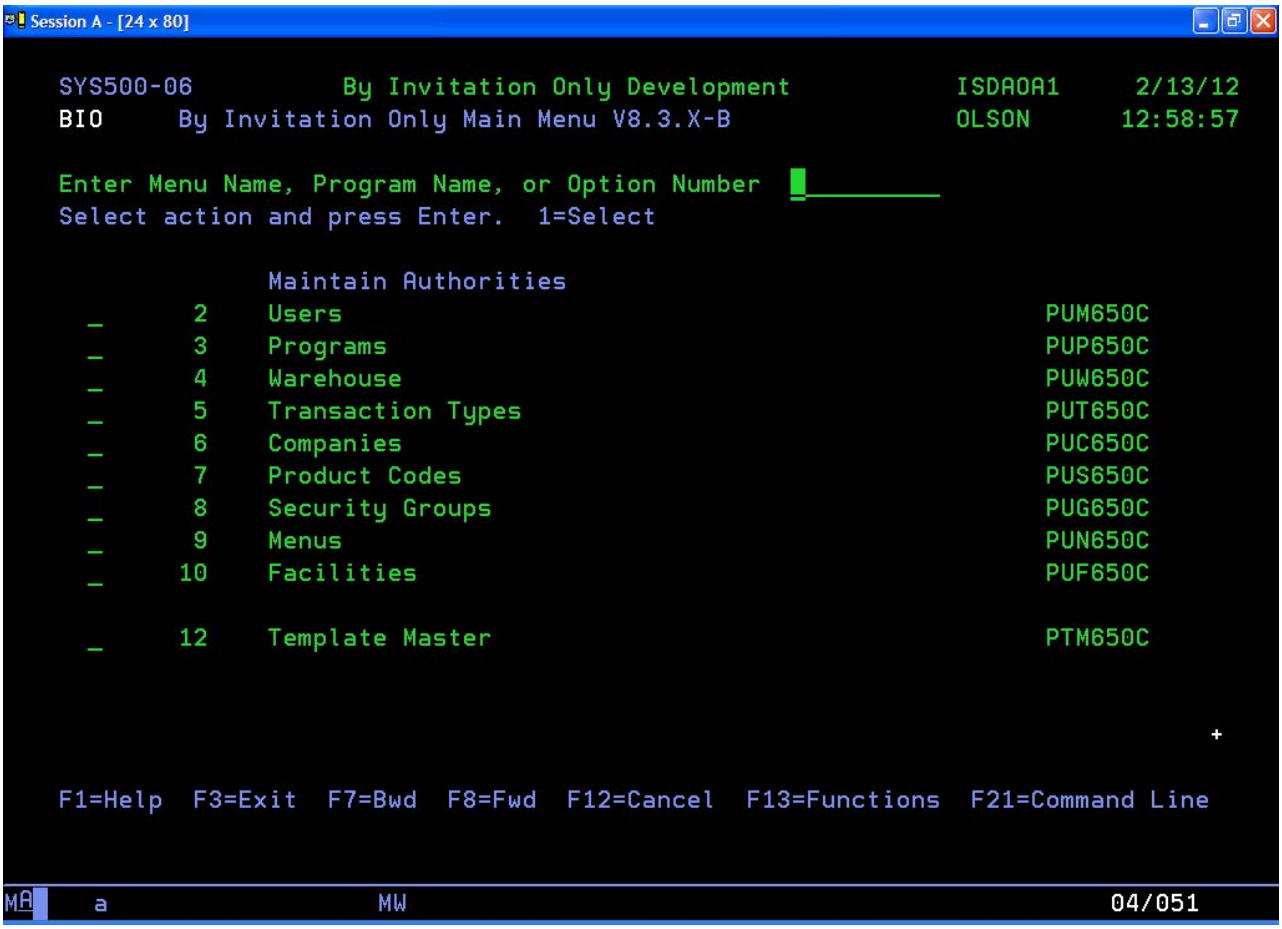
Getting Started Overview

Presentation of Main Menu

When you execute By Invitation Only (BIO), the following menu appears.

Screen Shot 01

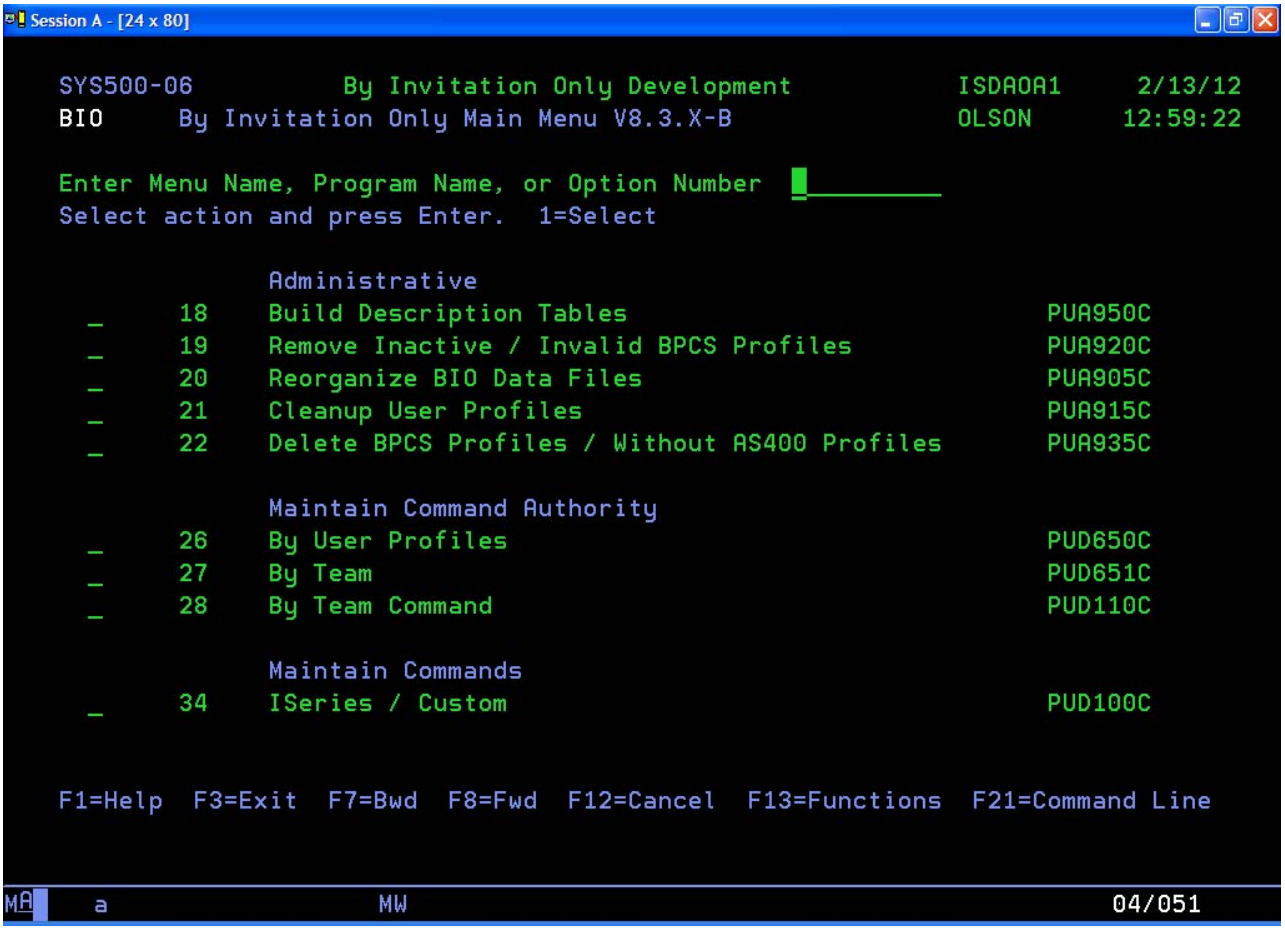

Session A - [24 x 80]
SYS500-06 By Invitation Only Development ISDAOA1 2/13/12
BIO By Invitation Only Main Menu V8.3.X-B OLSON 12:58:57
Enter Menu Name, Program Name, or Option Number
Select action and press Enter. 1=Select
Maintain Authorities
2 Users PUM650C
3 Programs PUP650C
4 Warehouse PUW650C
5 Transaction Types PUT650C
6 Companies PUC650C
7 Product Codes PUS650C
8 Security Groups PUG650C
9 Menus PUN650C
10 Facilities PUF650C
12 Template Master PTM650C
F1=Help F3=Exit F7=Bwd F8=Fwd F12=Cancel F13=Functions F21=Command Line
MA a MW 04/051

Please use the Page Up and Page Down keys to scroll through the menu. Additional content from the main menu is presented on the next page.

Getting Started Overview

Presentation of Main Menu, continued ....

Screen Shot 02


Session A - [24 x 80]
SYS500-06 By Invitation Only Development ISDAOA1 2/13/12
BIO By Invitation Only Main Menu V8.3.X-B OLSON 12:59:22
Enter Menu Name, Program Name, or Option Number
Select action and press Enter. 1=Select
Administrative
18 Build Description Tables PUA950C
19 Remove Inactive / Invalid BPCS Profiles PUA920C
20 Reorganize BIO Data Files PUA905C
21 Cleanup User Profiles PUA915C
22 Delete BPCS Profiles / Without AS400 Profiles PUA935C
Maintain Command Authority
26 By User Profiles PUD650C
27 By Team PUD651C
28 By Team Command PUD110C
Maintain Commands
34 ISeries / Custom PUD100C
F1=Help F3=Exit F7=Bwd F8=Fwd F12=Cancel F13=Functions F21=Command Line
MA a MW 04/051

Select Option 2 from the By Invitation Only main menu to processes configurations and information by profiles. Please refer to the next major section of this User's Guide for a step-by-step explanation of Maintaining Authorities by Profile functionality.

Maintaining Authorities by Profile

The initial Maintaining Authorities by Profile Panel

In the Maintaining Authorities by Profile Program, templates are displayed in white and user lines are displayed in green. Users without a valid OS profile are displayed in reverse image.

Screen Shot 03

Session A - [24 x 80]
PUM650D By Invitation Only Development ISDAOA1 2/08/12
By Invitation Only - User Master Maintenance OLSON 09:53:37
Select Option: 2=Revise User 3=Copy User 4=Delete User 8=Templates
10=Programs 11=Warehouse 12=Trans. Types 13=Facility 14=Companies
15=Products 16=Menus 17=Ind. Cmds 18=Team Cmds 19=Print
Number of Users = 24
Opt User User Name T All Group Template
ADAM Adam Jones - BIO U 0 SSA APCLERK
ALEX Alex Smith - BIO U 0 SSA
ALLISON Allison Johnson - BIO U 0 SSA
AMYB Amy Barns - BIO U 0 SSA
AMYQ Amy Quinton - BIO U 0 SSA
APCLERK Accounts Payable Clerk U 0 SSA Master
ARCLERK Accounts Receivable Clerk U 0 BIO Master
BART Bart Adams - BIO U 0 SSA APCLERK
BEN Ben King - BIO U 0 SSA
BILL Bill Jackson - BIO U 0 SSA
BLCLERK Billing Clerk U 0 SSA Master +
F3=Exit F6=Create User Profile F12=Cancel F19=Print All F22=User Types
MA a MW 10/002

Function Keys

F3	Exit Program
F6	Create User Profile
F12	Cancel Program
F19	Print All
F22	User Types

Option Numbers

2	Revise User Profile
3	Copy User Profile
4	Delete User Profile
8	Display User Authority to Templates
10	Display User Authority to Programs
11	Display User Authority to Warehouses
12	Display User Authority to Transaction Types
13	Display User Authority to Facilities
14	Display User Authority to Companies
15	Display User Authority to Product Codes
16	Display User Authority to Menus
17	Display Individual Command Authorities
18	Display Group Command Authorities
19	Print User Authorities